



# Getting Started

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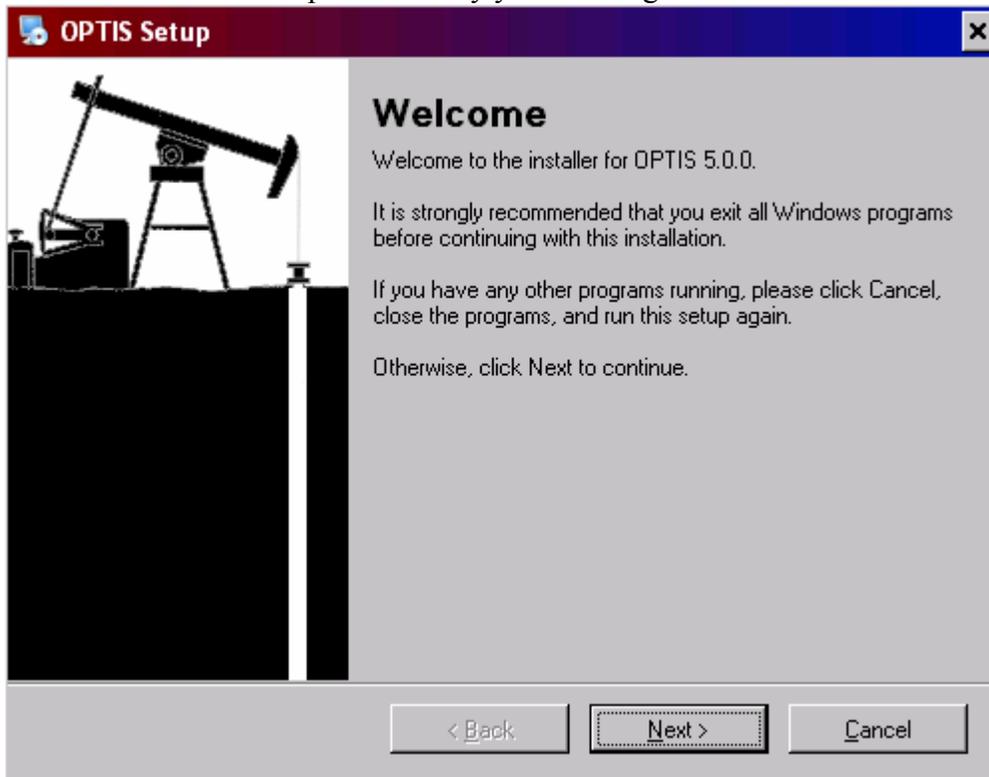
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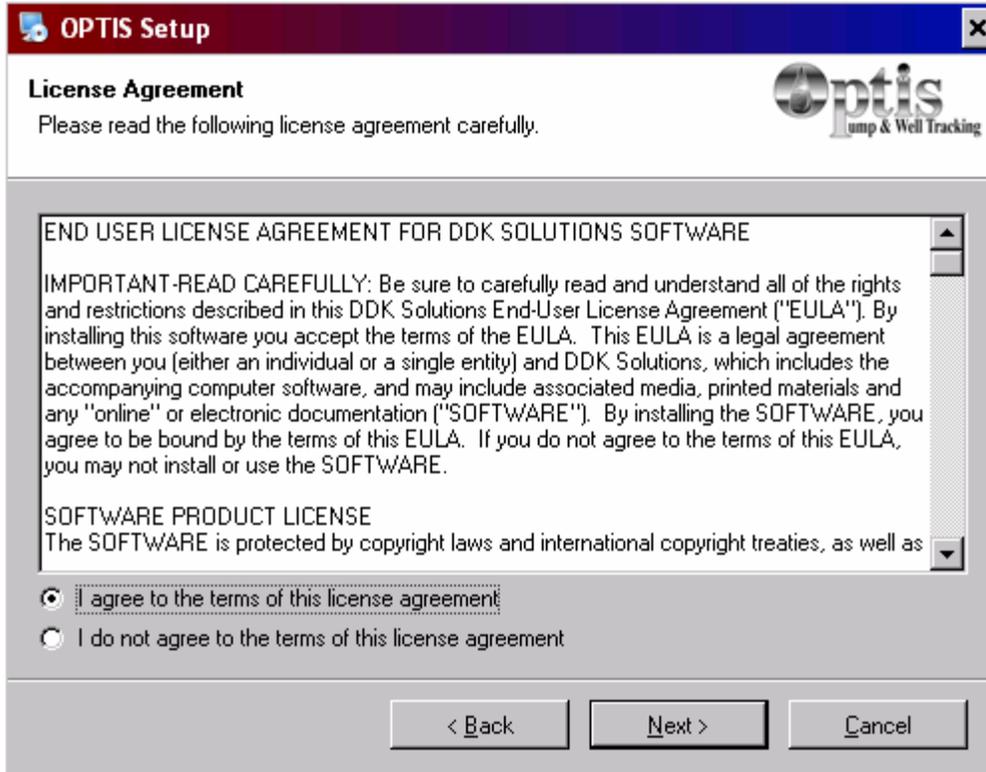
# Installation

There are multiple ways to install OPTIS. The two most common are **Standalone** and **Network**. Standalone is where the software is installed on the same computer on which the data will be entered. Network is where the OPTIS database is installed on a server and a workstation installation is installed on the machines that will be used to enter the data. The only difference is where the data will be located. Here are the steps to Install OPTIS.

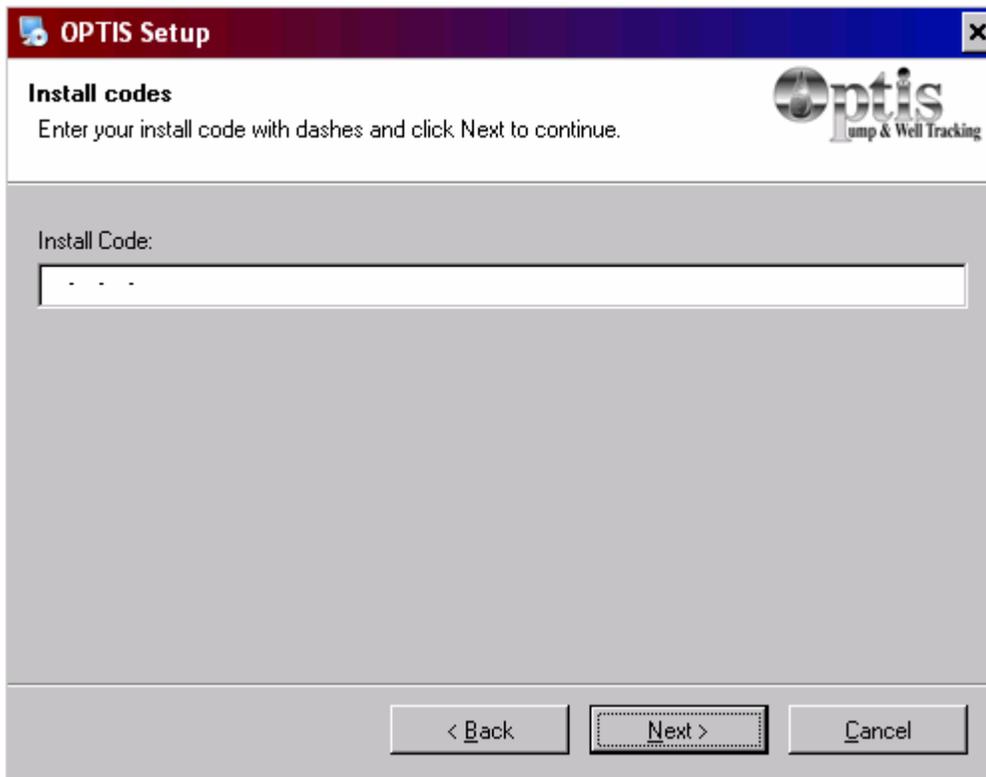
1. Place CDRom in cdrom drive. If the install does not automatically start, browse to the cdrom and click on setup. Either way you should get a screen like this.



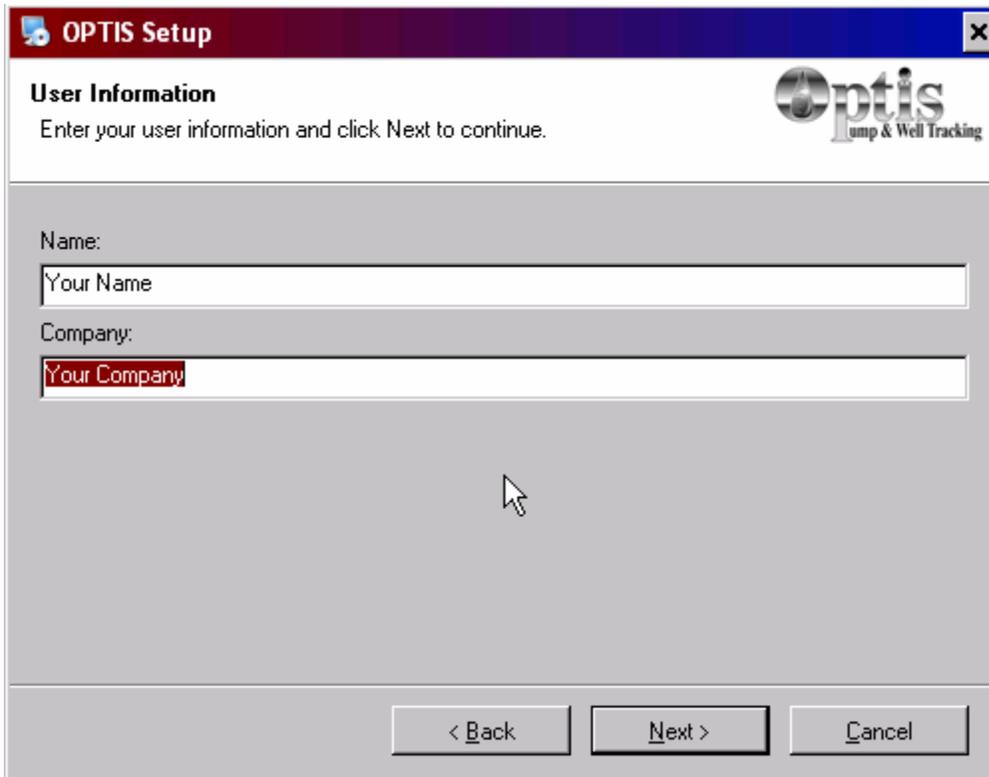
2. Please click Next. After reading and agreeing to the License Agreement, please click next.



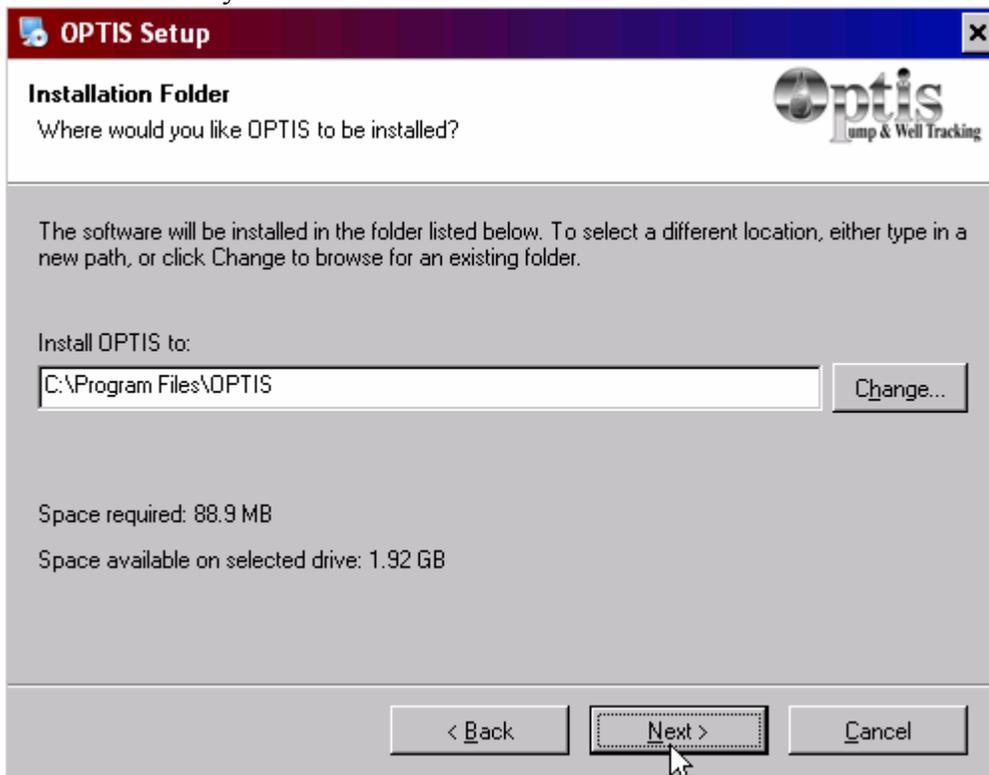
3. Please enter the installation code on the back of the CD case.



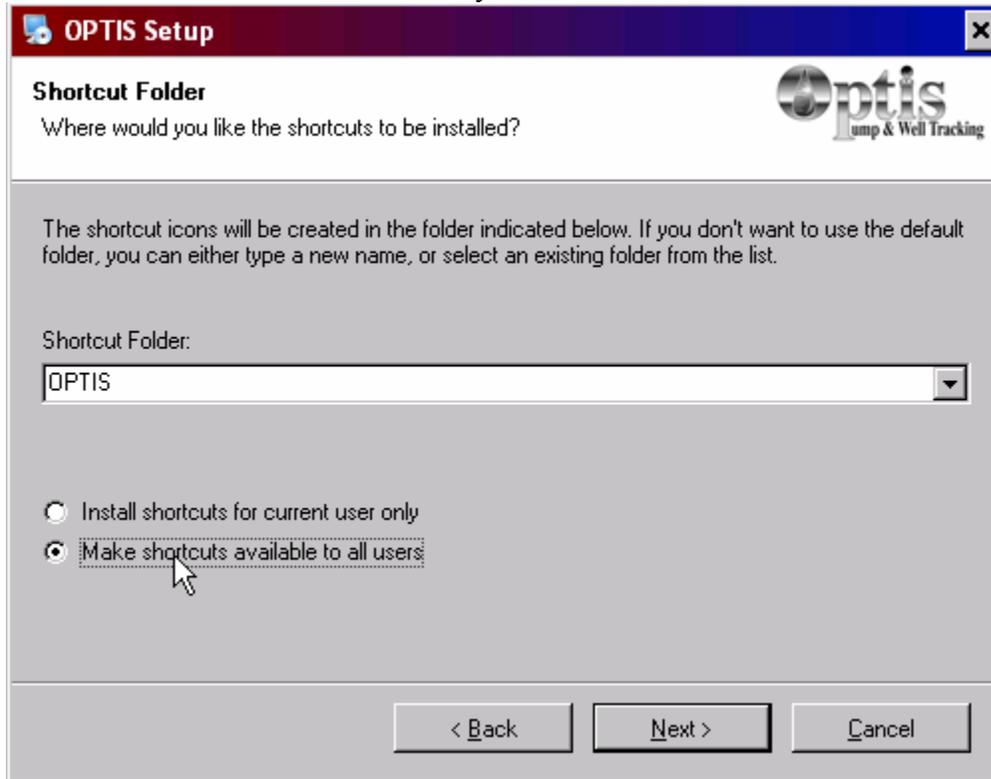
4. Please enter your name and your company name and click next.



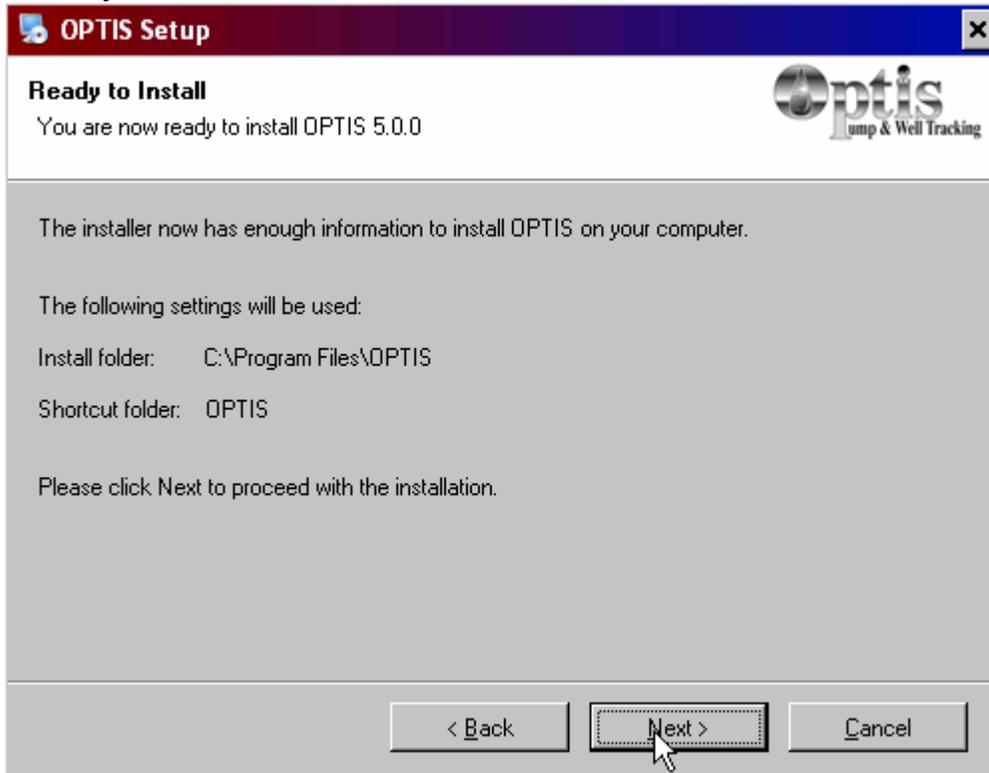
5. Please enter the location where the data will be stored. If this is a “standalone” install the default should be fine. If this is a “Network” install please browse to the location on the server where you want the data to be.



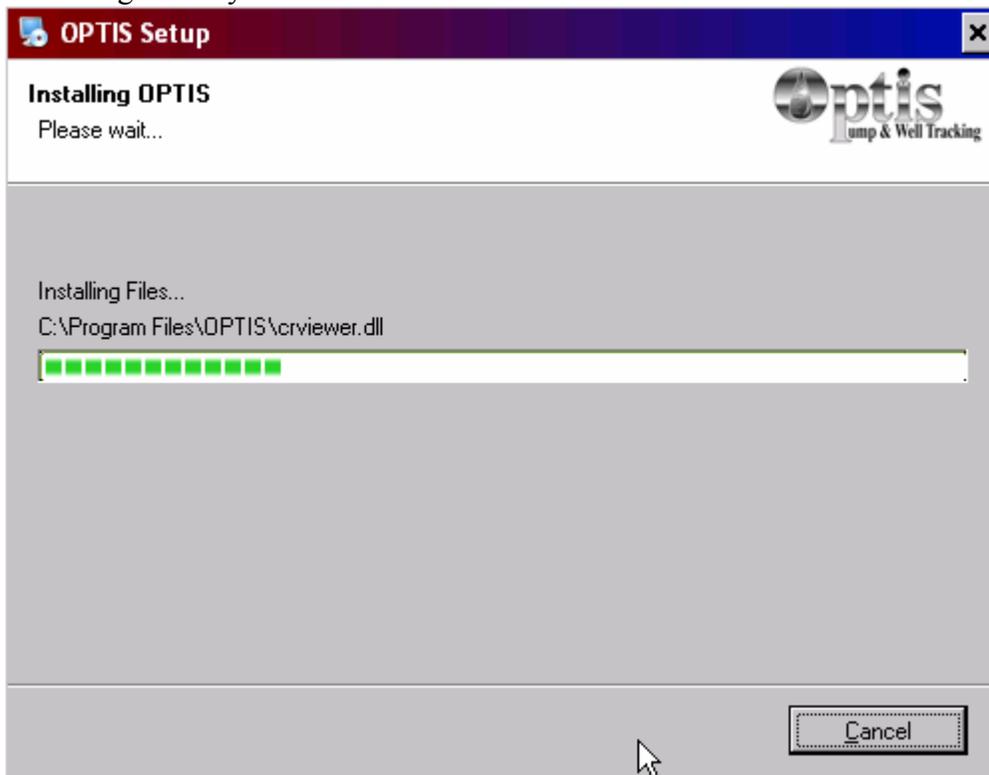
6. If you want an OPTIS icon in everyone's program files check the "Make shortcuts available to all users. If you want an OPTIS icon to only be for this user check the "Install shortcuts for current user only"



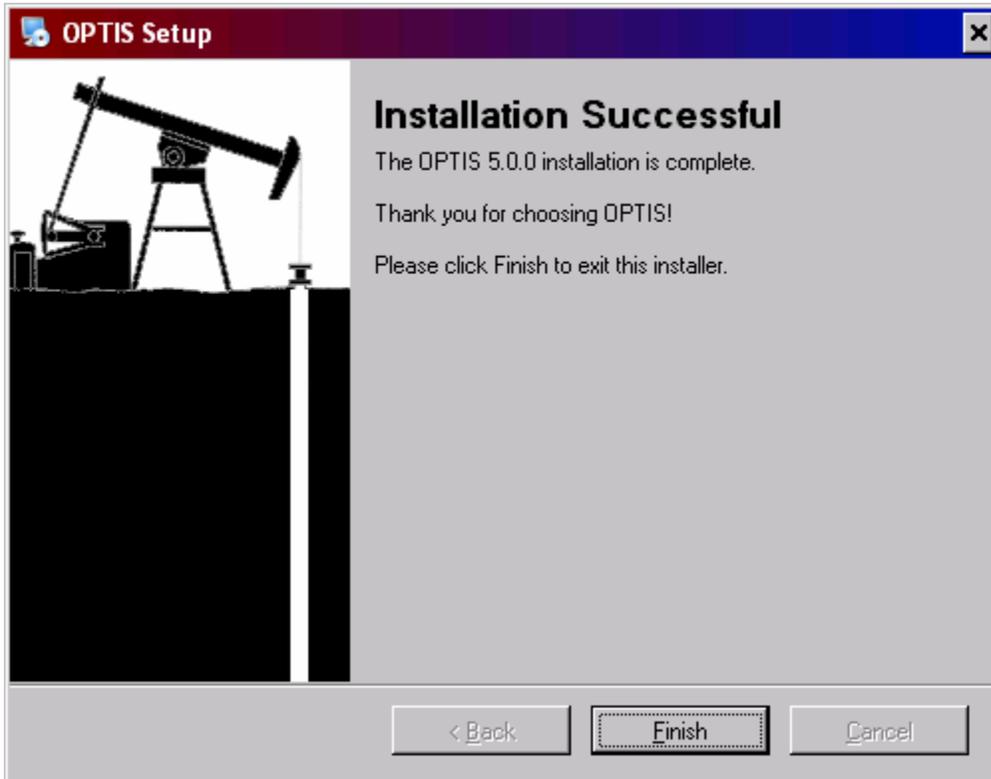
7. Verify the information.



8. During install you should see a screen like this.



9. When done click on “Finished”



## Workstation Install

Same steps as a full install but you need to run the setup from the “Workstation” folder on the cdrom.

## OPTIS after installation procedure.

OPTIS uses many tables for ease of data entry. Before a single pump repair can be entered some of these tables must have some data in them. The tables are as follows:

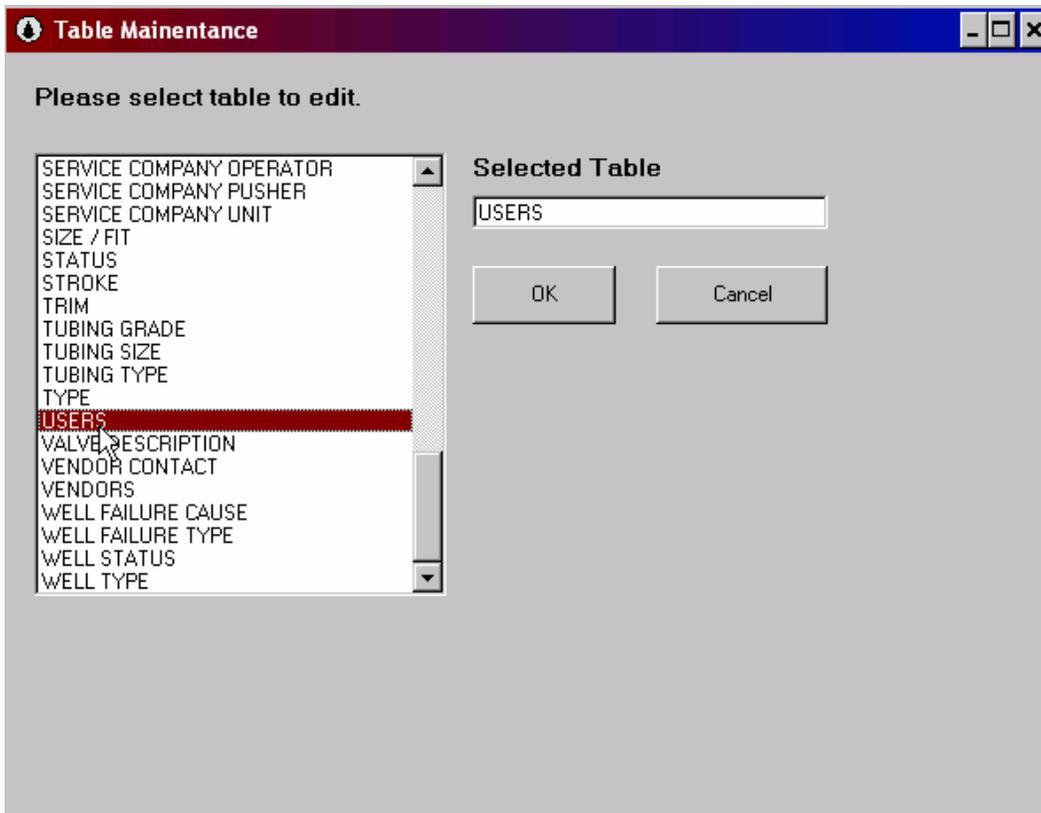
- Users – This sets up user ID's for those using OPTIS
- Customers
- Area
- CoPerson – This is the contact for the customer.
- County
- Fields
- Inventory – This is need for Quotes and Invoices
- Lease
- Pump Locations
- Sales Staff
- Vendors
- Wells\*
- Pumps\*

\*Both wells and pumps can be generated on the fly.

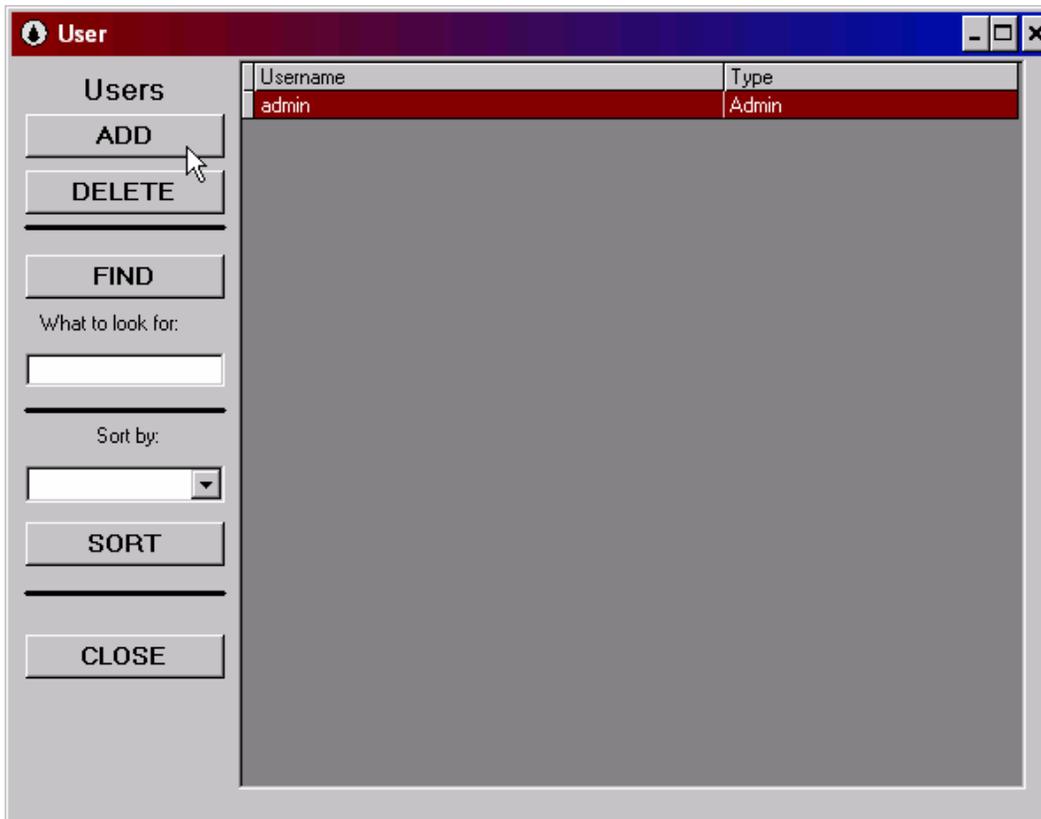
To update and enter data into OPTIS you must first login as an administrator account. OPTIS's default account is **Admin** with a password of **admin**. Remember this username and password is printed in all documentation. Please add a new administrator and remove Admin.

Here are the steps to enter a new users.

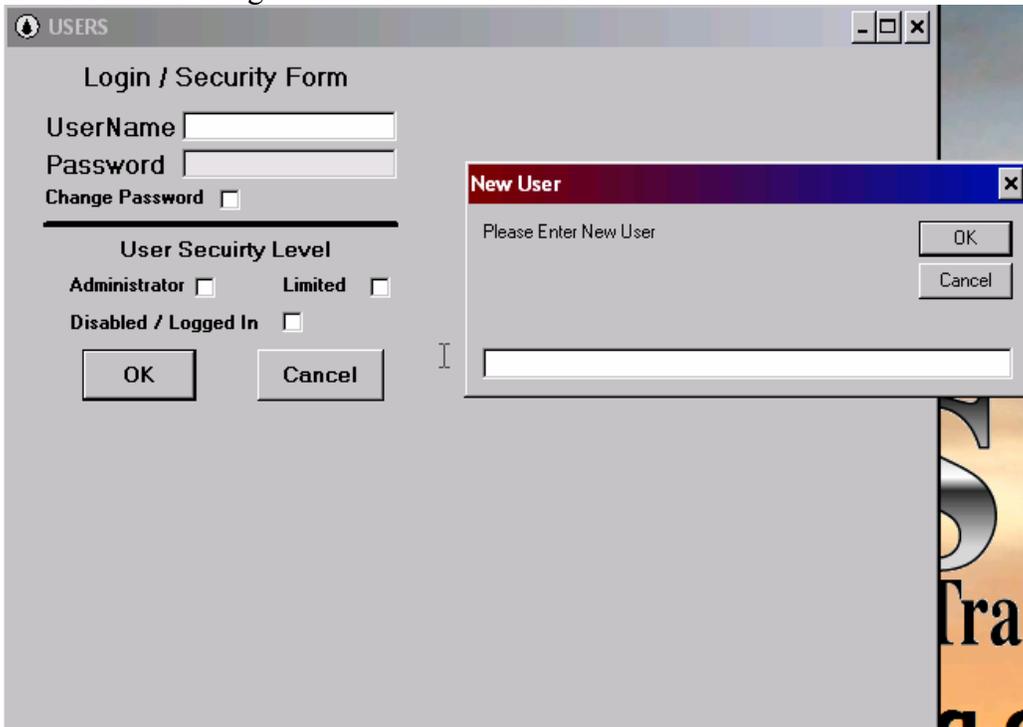
1. Login with an administrative account.
2. Click on File
3. Click on Table Maintenance
4. Click on Data Tables
5. Click on Users



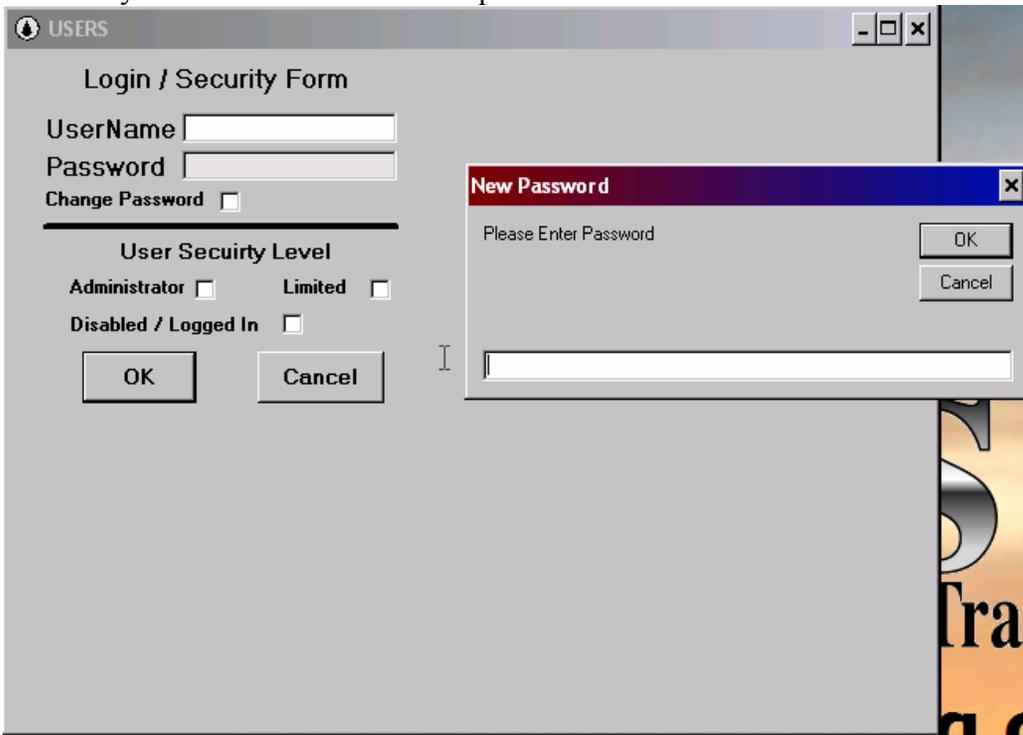
6. Click on the “ADD” Button



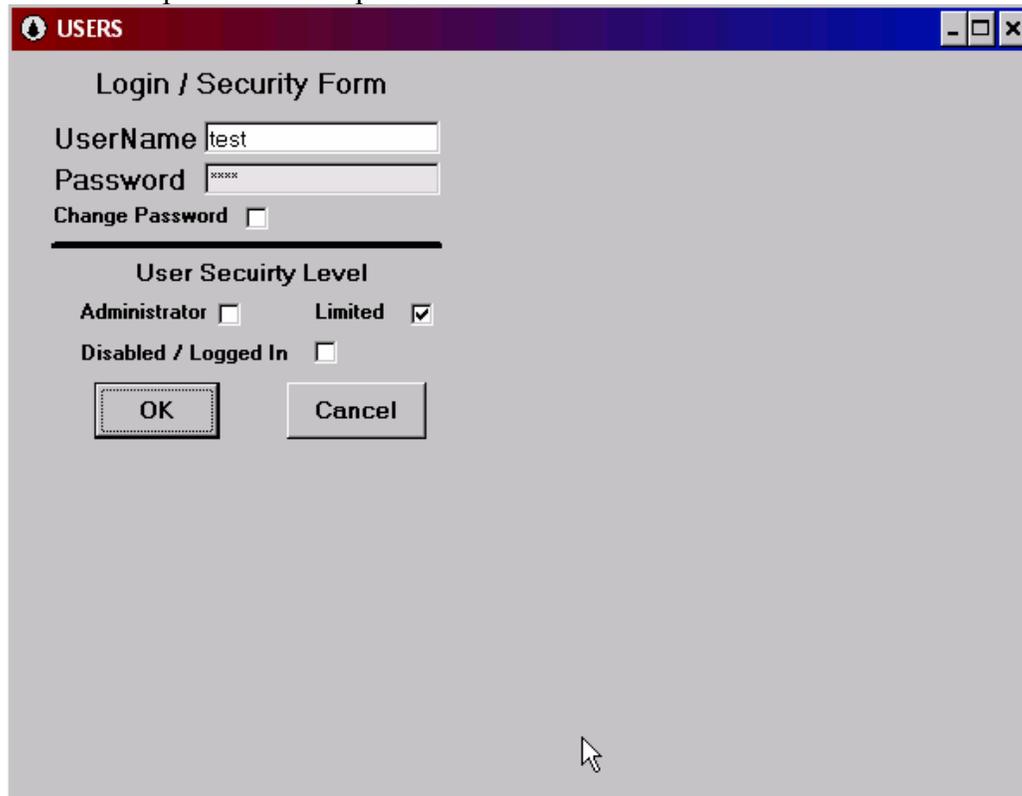
7. Next enter the login name for the new user.



3. Next you will be asked to enter a password and confirm it.



4. Next you will need to decide if this is an administrative user with full rights to all parts of the program or a limited account. Limited accounts can only enter data and complete limited reports. Click “OK” when finished.

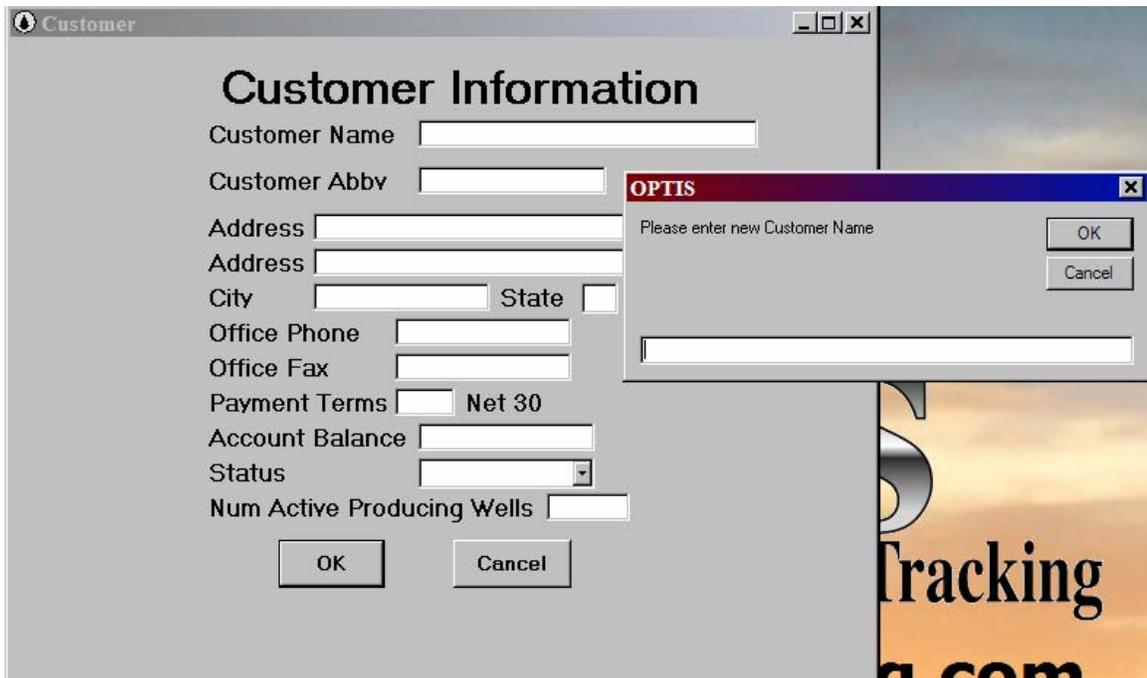
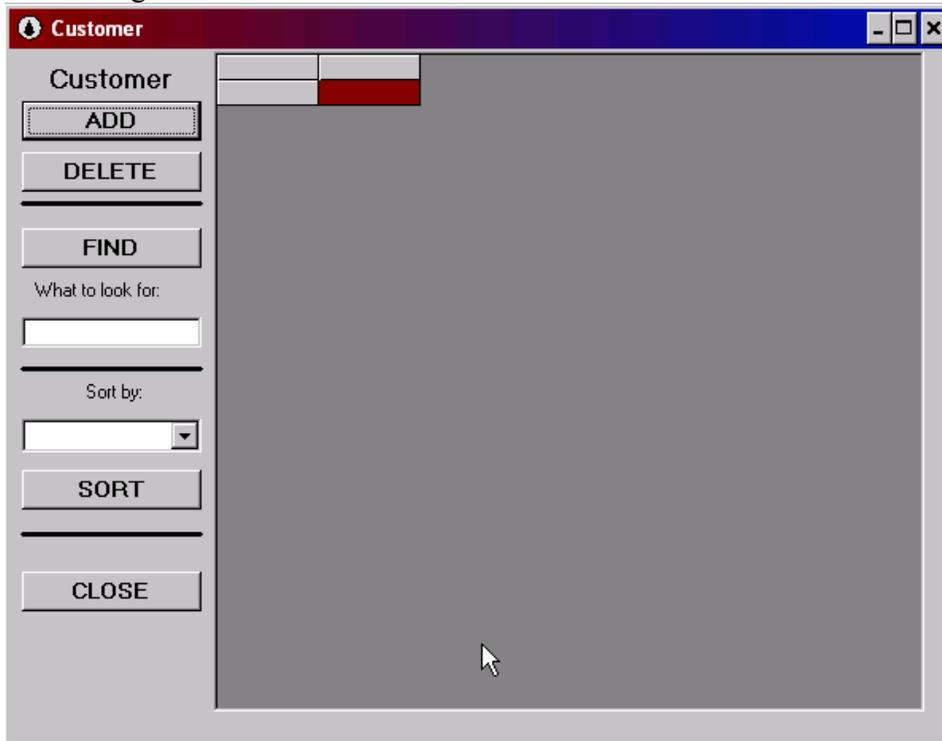


The image shows a Windows-style dialog box titled "USERS". Inside the dialog, there is a section titled "Login / Security Form". This section contains three input fields: "UserName" with the text "test", "Password" with masked characters "xxxx", and a "Change Password" checkbox which is unchecked. Below this section is a horizontal line, followed by a section titled "User Security Level". This section contains three checkboxes: "Administrator" (unchecked), "Limited" (checked), and "Disabled / Logged In" (unchecked). At the bottom of the dialog are two buttons: "OK" and "Cancel". A mouse cursor is visible near the bottom center of the dialog box.

# Customers

Here are the steps to enter data into the customer table.

1. Either click on the “Customer” icon or click File-> Table Maintenance -> Customer
2. The first time you need to enter a customer name and a customer abbreviation. By clicking on the “ADD” Button.



3. Enter any more information about that customer. The payment terms are the percent discount for NET 30 day payment.

**Customer Information**

Customer Name

Customer Abby

Address

Address

City  State  Zip

Office Phone

Office Fax

Payment Terms

Account Balance

Status

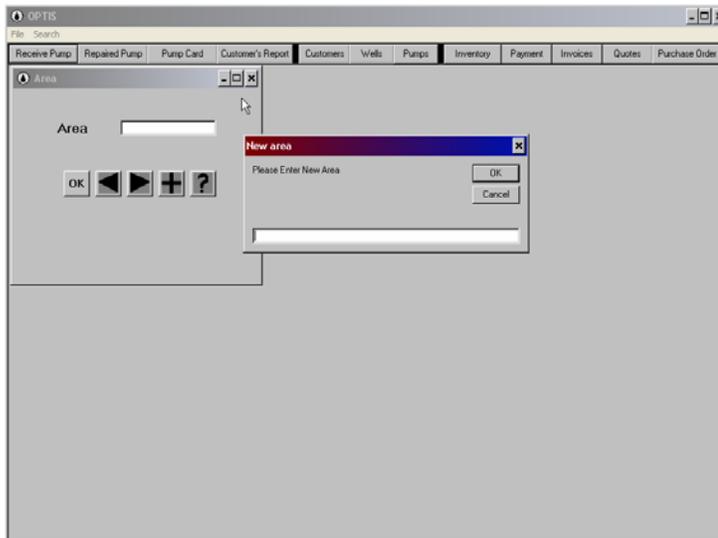
Num Active Producing Wells

4. Click "OK" when finished.
5. To enter more customers complete the following.
  - a. Open Customers either by "Customer" icon or File-> Table Maintenance -> Customer
  - b. Click the + symbol
  - c. Enter new customer name and abbreviation
  - d. Click "OK" when finished
6. Repeat step 5 until complete entering customers.

## Area

Here are the steps to enter data into the area table.

1. Click on File-> Table Maintenance -> Data tables -> Area
2. The first time you will be asked to enter an area.

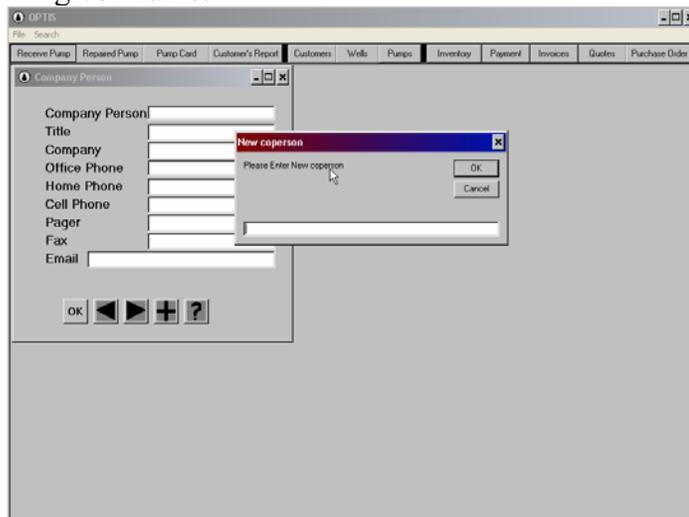


3. Click the + symbol to add more areas.
4. Click "OK" when finished

## Company Person (Coperson)

Here are the steps to enter data into the coperson table. This is the contact list for the companies in the company table.

1. Click on File-> Table Maintenance -> Data tables -> Coperson
2. The first time you will be asked to enter a company person.
3. Note: The Company person's name will be sorted by the first letter of the name. If you want to sort by the surname, you must enter it first, then a comma, then the given name.

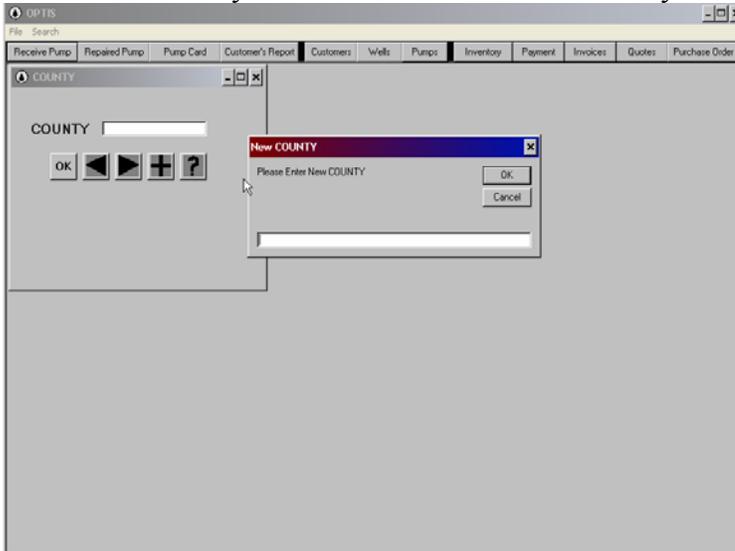


4. Please enter any information you need about that contact. The company the person works for should be in the pull down on the company line.
5. Click "OK" when finished
6. To enter more company people please open up the Coperson table and click the + symbol. Follow steps 2 and 4.

# County

Here are the steps to enter data into the county table.

1. Click on File-> Table Maintenance -> Data Tables -> County
2. The first time you will be asked to enter a county.

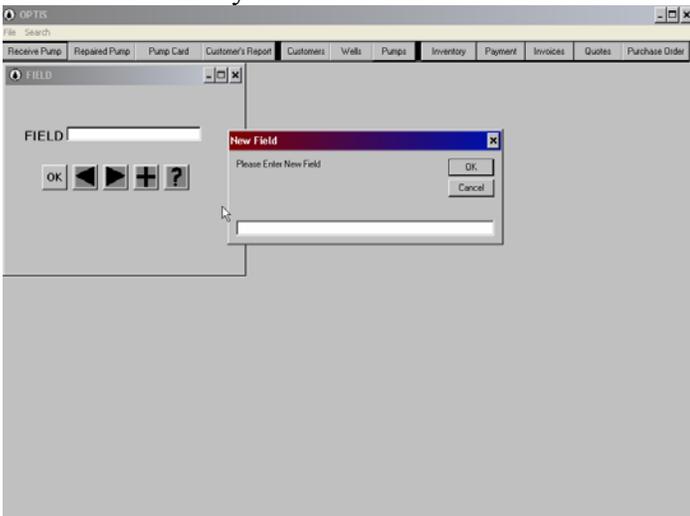


3. Click the + symbol to add more counties.
4. Click "OK" when finished.

# Fields (Oil fields)

Here are the steps to enter data into the fields table.

1. Click on File-> Table Maintenance -> Data Tables -> Fields
2. The first time you will be asked to enter a field.

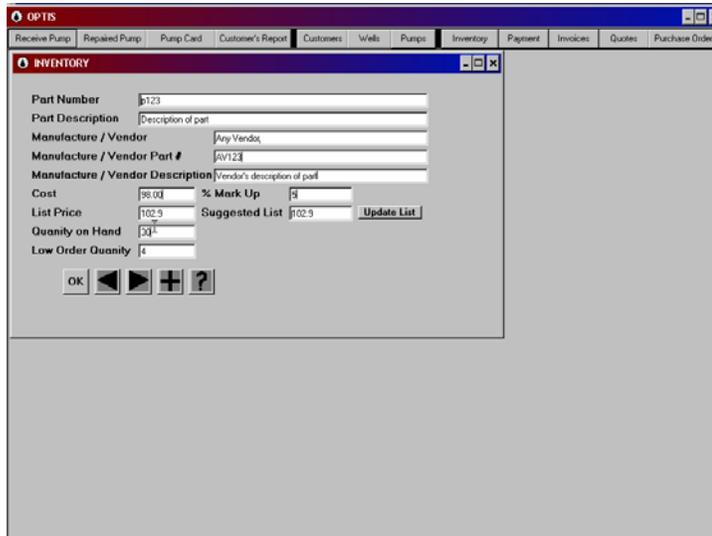


3. Click the + symbol to add more fields.
4. Click "OK" when finished.

# Inventory

Here are the steps to enter data into the inventory.

1. You can get into the inventory table in two ways.
  - a. Click on the “Inventory” icon
  - b. Click on File-> Table Maintenance -> Data Tables -> Inventory
2. The first time you will be asked to enter a part number.
3. Please enter the rest of the information about the part.
4. OPTIS can figure list price with a specific mark-up by clicking on the update list button.

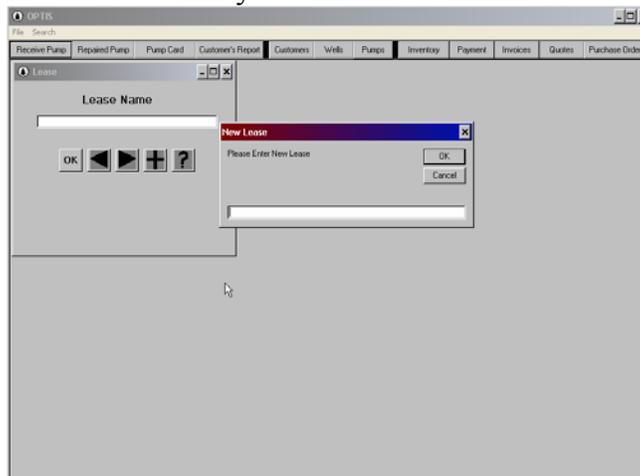


5. Click “OK” when finished.
6. To enter another part number repeat steps 1 through 5.

# Lease

Here are the steps to enter data into the lease table.

1. Click on File -> Table Maintenance -> Data Tables -> Lease
2. The first time you will be asked to enter a lease name.

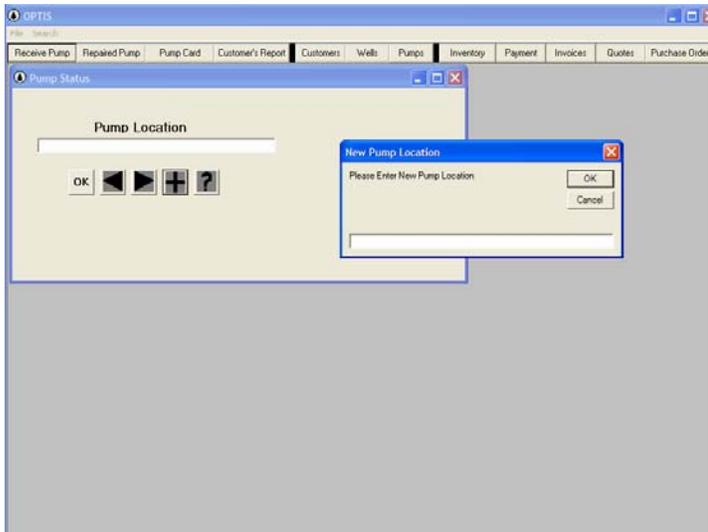


3. Click the + symbol to enter another lease.
4. Click “OK” when finished.

## Pump Location

The pump location helps report where the pump is physically located. The location is generated when a pump is placed in a well, but you will need to edit the locations to describe the warehouse, salvaged, or junked, etc. Here are the steps to enter data into the pump location table.

1. Click on File -> Table Maintenance -> Data Tables -> Pump Location.
2. The first time you will be asked for a location if a pump has not been put in a well.

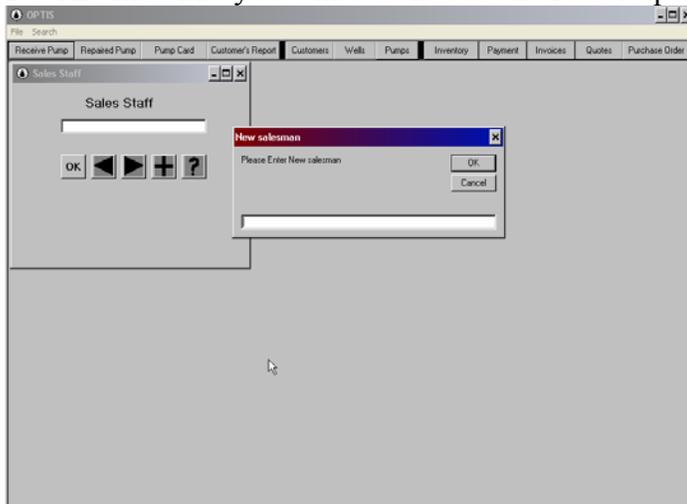


3. Click the + symbol to add other locations
4. Click "OK" when finished.

## Sales Staff

Here are the steps to enter data into the sales staff table.

1. Click on File -> Table Maintenance -> Data Tables -> Sales Staff.
2. The first time you will be asked to enter a salesperson.



3. Click on the + symbol to add more sales staff.
4. Click "OK" when finished.

# Vendors

Here are the steps to enter vendors in the vendor table.

1. Click on File -> Table Maintenance -> Data Tables -> Vendors
2. The first time you will be asked to enter a vendor name.
3. Please enter the rest of the information about that vendor.

The screenshot shows the 'Vendor Information' form within the OPTIS software. The form is titled 'Vendor Information' and contains the following fields:

- Vendor Name: [Vendor1]
- Vendor Abbv: [vend1A]
- Vendor Number: [ ]
- Address: Any street, Anytown TX 12345
- Contact 1: [Vendor contact 1]
- Contact 2: [Vendor contact 2]
- Contact 3: [Vendor contact 3]
- Phone #: 1-222-983-9303
- Fax #: 1-222-983-1234
- UPS #: [ ]

At the bottom of the form, there is an 'OK' button and several navigation arrows (left, right, up, down, and a question mark).

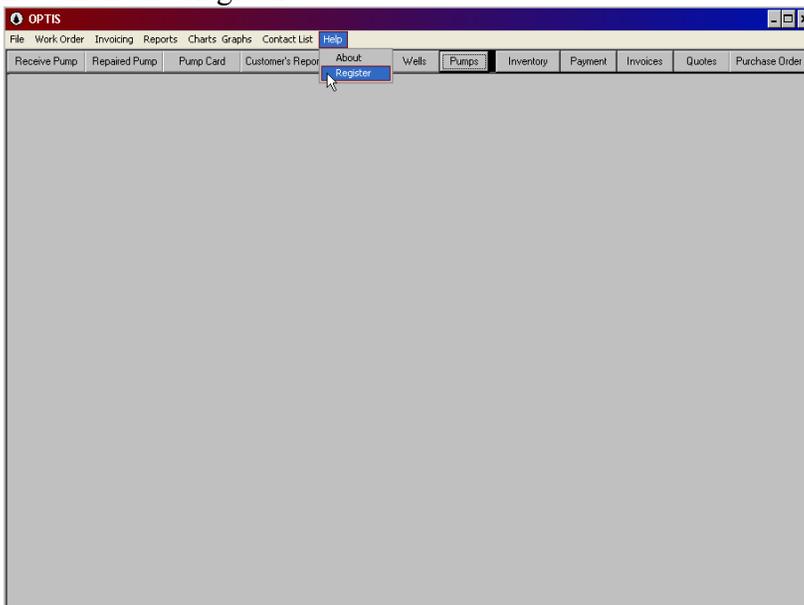
4. Click "OK" when done.
5. To add another vendor repeat steps 1 through 4.

# Registering OPTIS

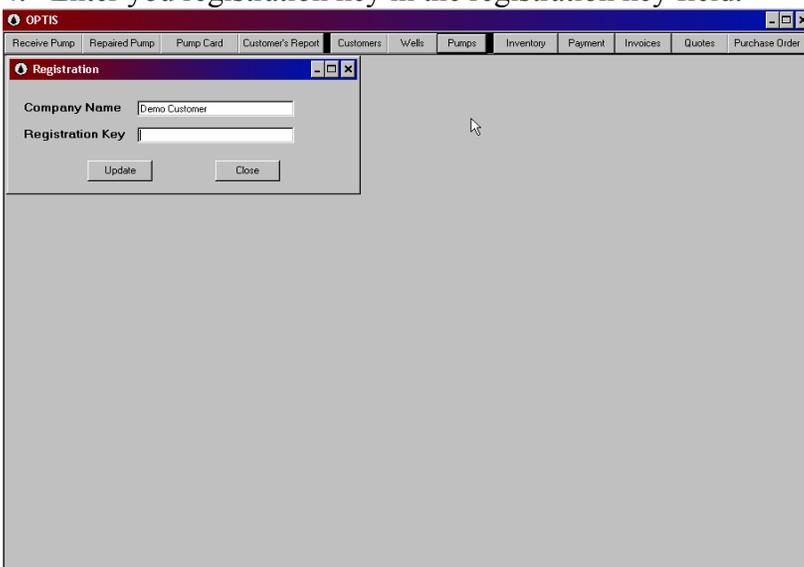
OPTIS by default is installed as a DEMO program. Because it is full functioning demo it is limited to 60 days. At the end of the 60 days OPTIS will no longer function without registering. To keep this from happening, please take time to purchase/register the program.

Here are the steps to register OPTIS.

1. Click on the “Help” menu icon
2. Click on “Register”



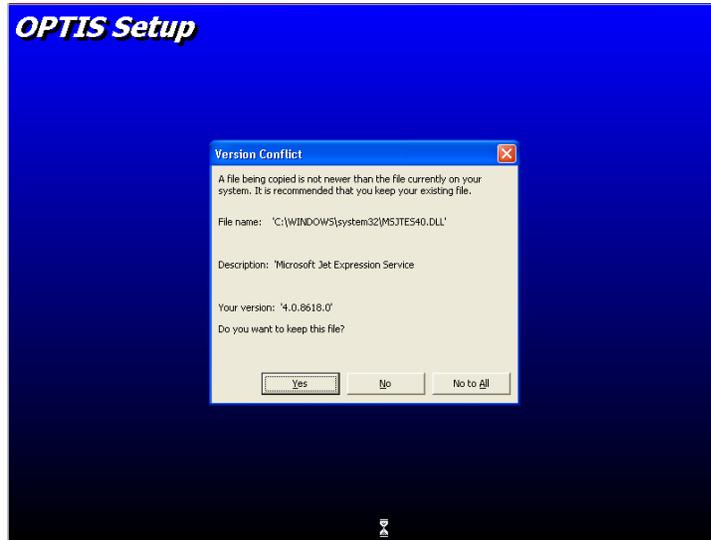
3. Enter your company name in the company field. This is the name that will be placed at the top of all the reports.
4. Enter your registration key in the registration key field.



5. Click “Update”  
Trouble shooting.

Q. I received a “Version conflict” during installation. Should I keep the newer files?

A. Answer “yes” you do want to keep the newer file. This just means that a newer file is on your computer. Overwriting the newer files with older ones may keep you system from restarting.



Q. Should I backup my system before installing OPTIS?

A. Yes. Anytime you install software it is a good idea to backup your system.

Q. Why do I need to populate so many data tables?

A. Many of the data entry forms OPTIS uses has drop down boxes. These boxes allow uniform data to be placed in the database.